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ABSTRACT

Based on a needs assessment survey of American Society for Training and Development members, this sourcebook provides practical information for trainers in business and industry. The guide is organized in five chapters: "Program Evaluation: A Model for Technical Programs" (Dan Gehler); "Transfer of Training: Readiness--Have We Thought about It" (Vicki Thorland-Oster); "Needs Assessment: Where's the Secret Formula?" (Michael Blackburn); "Management Development Programs" (Jim Hayward); and "Career Development within the Workplace" (Sally Walker). (KC)

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NEW DIRECTIONS FOR TRAINING AND DEVELOPMENT: PROBLEMS AND SOLUTIONS

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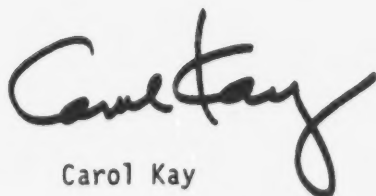
INTRODUCTION

The February, 1987 issue of the Pipeline featured a needs assessment instrument constructed by the Professional Development Subcommittee. The instrument identified 11 scenarios or dilemmas often faced by training professionals. ASTD members were requested to rate their need for solutions to the scenarios by responding to a ten point scale ranging from very important to not very important.

Sixty-four individuals or 25% of the membership responded to the survey. The majority of the scenarios were rated as very important and important topics to our members.

	<u>Very Important</u>	<u>Important</u>	<u>Not Important</u>
Evaluation of Training	76.19%	17.46%	6.35%
Transfer of Training	66.66	20.63	12.70
Needs Assessment	66.13	22.58	11.29
Training the Trainer	56.45	30.65	12.90
Management Development	52.38	41.27	6.35
Cost Benefit Analysis	50.79	33.33	15.87
Organizational Development	38.71	40.32	20.97
Consumer of Training	33.33	47.62	19.05
Organizational change	30.06	38.71	30.06
Career Development	27.42	43.55	29.03
Instructional Media	27.42	43.55	29.03

A sourcebook was developed as a result of the members' interest. Iowa State University graduate students enrolled in Adult Education 595, Colloquium in Training and Development, reviewed the professional literature and compiled practical suggestions to topics of interest to the ASTD membership. The topics selected for investigation included: evaluation of training, transfer of training, needs assessment, management development, and career development. These topics appear as chapters in the ASTD sourcebook, New Directions for Training and Development: Problems and Solutions.



Carol Kay

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Program Evaluation:
A Model for Technical Training Programs

Dan Gehler

Communication Data Services

Our organization is faced with the issue of how to measure objectively the success of our training programs. Course participants are already completing evaluations, but these seem so subjective and only measure reactions. What measurement tool could we use that reflects what participants have learned and how they are used on the job?

Program Evaluation:

A Model for Technical Training Programs

The Iowa Association of Training and Development Professional Development Subcommittee surveyed members to assess their needs on a variety of training and development topics (Deems & Kay, 1986). The survey identified eleven scenarios and the participants were asked to rank them from very important to not important. One scenario dealt with the evaluation of training. The scenario was:

Our organization is faced with the issue of how to measure objectively the success of our training programs. Course participants are already completing evaluations, but these seem so subjective and only measure reactions. What measurement tool could we use that reflects what participants have learned and how they are used on the job?

On a ten point scale, 76.19 % of those responding to the survey ranked this item 1, 2, or 3. This survey

shows that training and development professionals are concerned about evaluation. The question then becomes what type and quality of the evaluation is being used.

Brandenburg (1982) and Clegg (1987) found that reaction surveys after training were the most common evaluation method used. While reaction evaluation do provide some valuable information, they are limited in both depth and scope (Zenger & Hargis, 1982). These reports show that although training and development people think evaluation is needed, they are not taking the time and money to conduct a complete evaluation. With the increasing amount of money being spent on training and development, evaluations must be conducted to justify this cost (Russ-Eft & Zenger, 1985; Clegg, 1987; Del Gaizo, 1984).

One thing standing in the way of evaluation is the attitude of the trainer. As long as no one asks for proof that the training is working, or effecting the bottom line, it is assumed that the training is working (Farber & Berger, 1985). Some also feel that some training outcomes can't be evaluated, or don't need to

be evaluated (Zenger & Hargis, 1982).

The literature, on the other hand, provides examples of program evaluation for most any program. These articles can be broken down into two different groups: anecdotal "how to" approaches and those of a data based or statistical nature.

The "how to's" are evaluations that the authors have successfully conducted. They provide the method and some simple results of the evaluation. These results do not include hard statistical information. The statistical articles provide the how to, but also include the hard statistical facts to substantiate their results.

While these articles are going about the proof in different ways, they have a number of things in common. First, they tend to follow, in theory, Kirkpatrick's evaluation model (1967). They have more than just a reaction survey after the training. The methods include not only the reaction, but also some form of evaluation to include testing for learning (Zenger & Hargis, 1982; Swierczek & Carmichael, 1985; Bruwelheide & Duncan,

1986; Sheppeck & Cohnen, 1985; Bakken & Bernstein, 1982), usually a follow-up evaluation.

The most common method of evaluation was the pre/post-test method. The instruments in these tests were mostly self assessments that the trainees filled out at some time during the evaluation.

The statistical articles followed the pre/post test, and add a control group to the model. These article included archival data such as turnover rate, tardiness managerial performance, grievances, responsibility, and other job performance measurements. These factors were compared before training and after training for experimental and control groups. The statistical articles reviewed provided mixed results as to the effectiveness of training in these areas (Kinsey, 1981; Rosentreter, 1979; Bruwelheide & Duncan, 1985; Ford & Wroten, 1984).

In attempting to answer the problem of evaluation, I also reviewed, briefly, the educational and social sciences literature. These areas have much to share with training and development as they regard

the purpose of evaluation and the methods differently. As was mentioned above, most of the training and development articles utilized pre/post test and control groups designs. Additionally their intent was to prove or justify the training program. While education and social science still heavily use both of these, they are also using alternative methods to do some of the evaluation that the pre/post test method is not suited.

Some of these methods include CIPP (Stufflebeam, 1966), responsive evaluation (Stake, 1973), anthropological approach (Koppelman, 1979), and broad-aims evaluation (Weiss & Rein, 1970). These methods move away from using objects and measure of actual results. Instead, they use case studies, interviews, and observation to provide information for the evaluation. Some, CIPP and Naturalistic (Guba & Lincoln, 1982) for example, allow for the basic design to change as the evaluation is taking place. Others, like goal free, don't develop goals or objectives for the evaluation. It is felt that goals and objectives restrain the evaluator and hence may not provide a true

evaluation of the program.

These models also have a different view of what the evaluation should be doing. Stufflebeam, the developer of the CIPP model, states that "the most important purpose of program evaluation is not to prove, but to improve." This idea was found in only two of the training and development articles reviewed (Easterby-Smith, 1985; Swierczek & Carmichael, 1985).

This emphasis on evaluation proving training works might account, in part, for training and development not doing complete program evaluations. If the evaluation might show that the program is poor, and the trainer has a stake in it, they may not want to know. Zenger and Hargis use the following: "Many of us fear calling a doctor. Bad news is painful. It's tempting to live in ignorance rather than to have our fears confirmed. Others argue that nothing can be done anyway. For some the expense does not seem worth the benefits of a possible cure. Rarely are the possible devastating consequences of ignorance fully considered." If evaluation didn't have a pass or fail associated with

it, evaluation might not be as painful.

In designing an evaluation model, I first listed the 5 factors that I felt needed to be in a good program evaluation. Those are: the evaluator is a believer, the evaluation starts at program conception, the evaluator and model are flexible, evaluation takes place before, during, and after training, and all people who have contact with the trainee are included.

Because of the time and the possible negative image of evaluation, the evaluator has to believe in the value of evaluation. If the evaluator is not committed to evaluation, and the time needed to do a complete one, the rest of this model will not work. If evaluators say that their program can't be evaluated, then my answer is that that person doesn't want the program evaluated.

The evaluation must start at program conception (Tyson & Binnbrauer, 1985). This will integrate the evaluation into the program. The types and amounts of data necessary will be considered as part of the program design. If an objective based evaluation is used, the objects are developed at the initial stages. This makes

the evaluation a part of the program, not something that is quickly put together. By starting the evaluation at the program's conception, the time needed to develop the evaluation can be spread through out the program development.

The evaluator has to be flexible so that a model can be developed that will fit the training program. If all I know is the pre/post model, I will want to try and fit all my evaluation to that model. If the evaluator feels the program being developed can't be evaluated, the right model is not being used. This means that the evaluator must be willing to try new things, and some reading to learn about the different models. In the same way, the model that is developed must be flexible, so that it can change as the needs of the program change with time.

Evaluation needs to be on going (Bahnuik, 1984). It is important to know what the people are bring into the training, mark progress during, and what they leave the training with. The last, what they leave the training with, might require follow-up to see if they

are able to apply what they learned. All of these should include not only the trainee, but also the manager or supervisor. This way, everyone's expectations can be determined, and perhaps reduce misunderstandings.

Keeping these five factors in mind, I developed the following model that I feel will meet my needs in evaluating the training programs that I am involved in. I am a technical trainer, and so I decided that an objective based evaluation would best suit my evaluation needs. It is important to remember that I am not proposing a model that should be used in all training programs. Item three of my list stated that you must match the model to the program, not the other way around.

The model that I develop has six steps (see figure 1). It is designed to be used as a program is being developed. I will, however, point out how it can be used to evaluate current programs.

Step one is the planning stage. This is where you would develop the objectives that will be used with the

program, and used to evaluate the program. This step must include the client for whom the program is developed. It is these clients who make the final decision regarding the value of the program. Planning should include when and how the evaluation will take place.

From here, you would move into the development step. As the program is developed, you should also be developing the evaluating instruments that will be used. These may be new instruments, or adapted from other programs. When the program is tested, the evaluation instruments should also be tested. This is to make sure the instruments are valid and reliable. It is important here that you try and test with people as close to the target audience as possible.

After the test, an assessment of the test would take place. Here the instruments would be used to evaluate the program. If everything came out as was expected, you could move into delivery. If the test yielded results you didn't expect, you would move back to the planning stage. Back in planning, you would look

at objects, evaluation instruments, and the evaluation model. It may be necessary to change one or all of these. If it is felt that all of these should be changed, you might need to take a closer look at the evaluation model to make sure it fits the training program.

For my use, instruments used will include a pre-training assessment of the trainee. This will be completed by both the manager/supervisor and the trainee. This will be used to determine the skill level the trainee is bringing to training. There will be content evaluations, tests if you will, during the training to track the progress and determine if the intended material is being received by the trainees. After training, a reaction survey will be given. The survey will ask the trainee how they will use the training on the job. I will have three follow-ups, one at one month, three months, and six months. These follow-ups will include a self assessment by the trainee and an assessment by the manager/supervisor, and an interview with both.

This information will then be used in the second assessment to see if any improvements need to be made in the program before it is offered again. The six month time frame will fit in our schedule because most of our training programs are offered about every six months. From here you could go back to planning if changes are needed, or, if you feel the program is fine, to delivery again. And the cycle continues. Unless major changes are needed in planning, once the program starts, you only go through planning, delivery, and assessment.

For programs that are already developed, they could start at delivery if they have some form of usable evaluation method. If not, they would need to start at planning. It would only be necessary to develop the evaluation part of the program. At the same time, however, you could look at the program in general, and see if it still meets the needs it originally was designed for.

At first, this model looks time consuming. But the largest part of it takes place in the initial development of the program. This is when large amounts

of time are already being spent. The evaluation can blend in, making the time needed to develop the evaluation appear to be less. After the initial development, this model provides for constant evaluation because it is built into the program.

This model will also help in developing support for evaluation. As the clients are asked to evaluate people and the program, they will come to expect it. This could also help in developing support of the training department because it would show that the department has a systematic way of conducting and improving what the program is providing.

This model is yet untested. The testing it will provide refining to make it work better in our corporation. It is currently planned to be used with the development of an advance JCL training program. We also will test the ability to use it for existing programs by evaluating the training program for new programmers.

There are two areas that I think need further research. Most models, including this one, use some form

of self assessment. Research needs to be done to determine the effectiveness of this, especially for people who, unlike educators, are not trained to evaluate. I think research also needs to be conducted to see if there is any correlation between a trainee's assessment, and that of the manager/supervisor, again keeping in mind that these people are usually not trained to evaluate.

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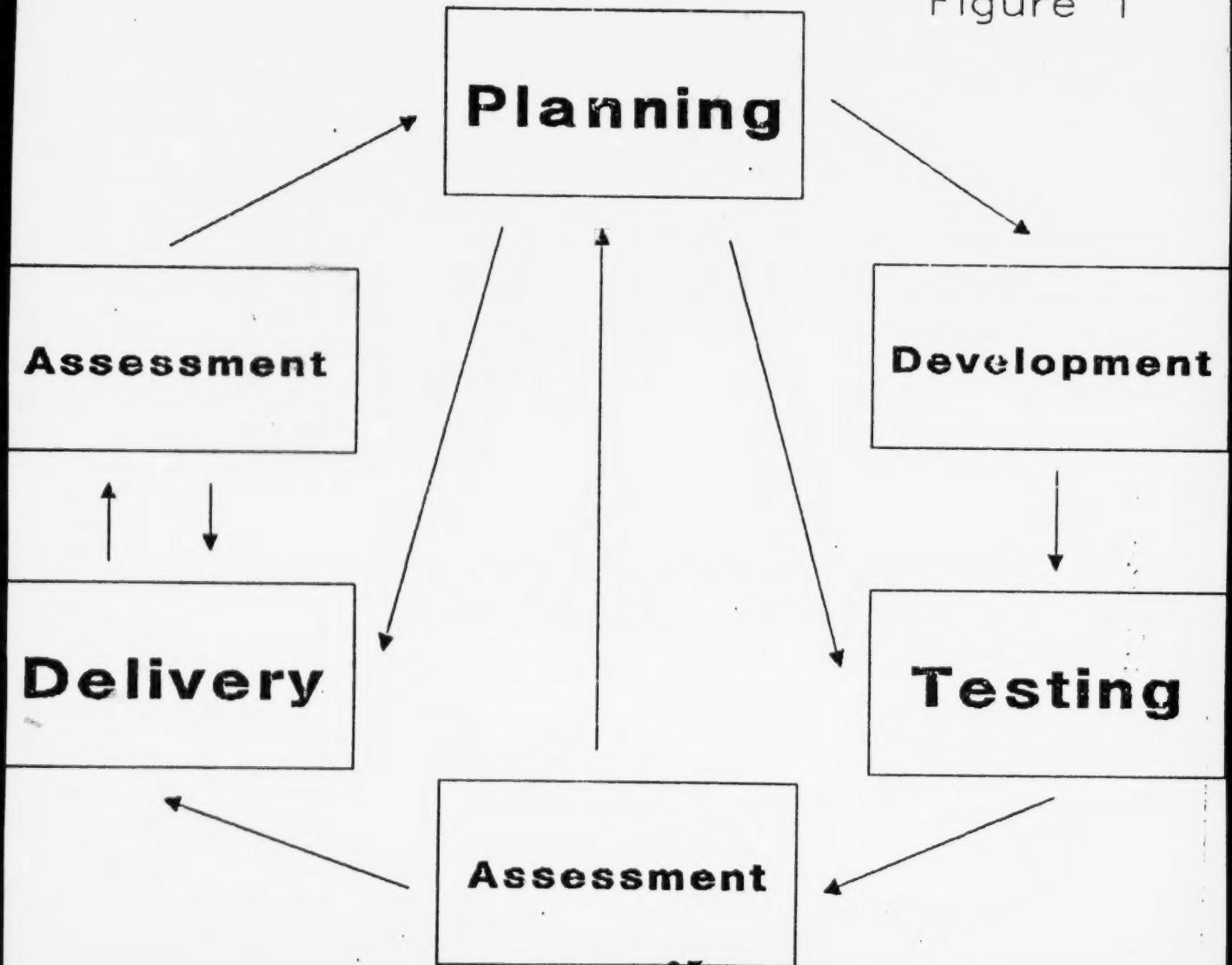
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Figure 1



Vicky Thorland-Oster

The Professional Development Subcommittee of ASTD surveyed training and development professionals. A topic which 66% of the ASTD membership indicated as very important was that of transfer of training. The question posed to these professionals was: "As a trainer I have often observed a group of trainees successfully complete training programs only to find out at a later date that they were not applying their new skills satisfactorily back on the job or worse, not applying them at all. Consequently, I, as trainer am held responsible by upper management for the resulting inadequacies. How can I be sure that the skills taught are carried over to the work setting?"

INTRODUCTION

Transfer of training can be an elusive quality. A trainer can find him/herself in a dilemma. For example, a group of trainees may successfully complete a training program. However, these same trainees, upon evaluation in the job setting, may not be using the skills they had mastered. Should the trainer be held responsible by upper management for the resultant inadequacies?

Transfer of training is an area of much concern for human resource specialists. Businesses are demanding cost effective programs in their training. They are asking what will be the benefit of training and how much will it cost? With this interest in "bottom-line" results, transfer of skills from the training to job performance are scrutinized. How can a trainer insure that the skills taught in the training session will be used on the job? This paper addresses an area which might have been overlooked by some trainers when planning instructional sessions.

DISCUSSION

Much of the literature in transfer of training

focuses on the content and methods of the training session. Very little empirical research has been conducted on the "readiness" of the employee for the training. Readiness, as defined by Webster's Dictionary (1971), "is the state of being prepared mentally or physically for some experience or action." Leifer and Newstrom (1980) address readiness as the first step in their training program. They recommend that training be divided into three time frame elements: 1)creating positive expectations, 2)creating performance opportunities, and 3)creating mechanisms to reinforce positive behavior. The first element in their article focuses on readiness of the employee.

The purpose of this paper is to identify and describe readiness factors and demonstrate their utility in transferring training skills to job performance. Four areas will be discussed: placement in the training session, job involvement of the employee (Noe, 1986); employee expectations (Jackson, 1985); and the need of a supportive work environment (Michalak, 1981).

Placement of employees in the training sessions is the first issue to be considered. Does the employee understand his/her need for the skills to be learned?

Has there been a performance appraisal or testing done to determine a lack of competence in a certain area? If there has been a type of formal evaluation to determine need, has the employee been informed of the results and does he/she feel the assessment was accurate?

Nadler (1982) indicates there are two levels of participants, those who are sent by the supervisor and those who volunteer. Stein (1981) refers to those who are sent by the supervisor as having a prescriptive learning need (an objective deficiency in performance). Noe (1986) states, "positive or negative reactions to the information individuals receive regarding their strengths and weaknesses are likely determinants of motivation to improve skills in a training program. . ." (p. 742). Therefore the employee, to get the full benefit of training, should be satisfied with his/her assignment to the training session.

Juxtaposed to selection of possible attendees is the need for notification and information regarding objectives or benefits of the training. Each of the attendees should have advance notice of the training and its intended on-the-job benefits (Leifer & Newstrom,

1980). Wlodkowski (1985) in his studies of motivational strategies for adult learning, agrees that the objectives need to be clearly stated because the more strongly a person feels a need, the greater chance the person will want to attain the goal.

After an employee has been notified of his/her placement in the training program and has reviewed the objectives of the session he/she will know what is expected during training. The key to the employee's readiness in this second area is that he/she perceives the benefits to be equal to or better than the effort required to attain these skills. If the trainee believes it is worthwhile to invest the time and effort on these skills, the chances are better that they will be implemented on the job. Jackson (1985), in his model outlining seven stages in an individual change process, discusses the need for positive expectancy on the part of the trainee. He/she must feel that the concept(s) will work and the results will be worth the effort put into changing behavior. Likewise, Ryman and Biesner (1975) in their study of the relationship of positive attitudes on training success among military personnel found that attitudes of confidence about training were

identifiable and valid for predicting success.

Proper placement techniques and the expectancy to succeed are not the only motivation factors for the trainee. The third factor of trainee readiness is one's involvement with one's job and the degree to which he/she is committed to it. Noe (1986) discussed career and job attitudes and the effect they had on the willingness of the employee to participate in the training session. An employee who views his/her current position as a plateau or who is only "waiting for something better to come along", will probably not commit him/herself wholeheartedly to the acquisition of new skills. Therefore the trainer should be cognizant of the degree of job involvement of the employee before having high expectations of transfer of skills to the job setting.

The fourth factor of readiness is the trainee's belief in a supportive work environment. The environment, identified here, is not only the physical surroundings but the individuals with whom the employee works. These people include supervisors and peers. The employee must perceive that there will be an enthu-

siastic reception of the skills learned in the training session and their implementation. A survey conducted by Opinion Research Corporation (1986) indicated that training might fail because the work environment does not support new behaviors learned in training and because management does not support the training program. Hand, Richards, and Slocum (1973) addressed this issue from the standpoint of the climate of the organization. They feel that a favorable climate within the organization encourages subordinates to be innovative, independent, and willing to try new forms of behavior. They studied the possible effect of organizational climate on the effectiveness of a human relations training program.

Further, the employee may judge the managerial support for this training program by its willingness to fund any new equipment or programming materials needed for implementation of new skills learned in training. If the physical setting of the corporation will not be adapted to use of innovative practices, the employee does not see the immediate need to learn new skills.

SUMMARY

In summarization, we, as trainers, need to be aware of the training readiness of the employees in our cor-

porations. We must ask ourselves if we have given the trainee the time to mentally and physically prepare for the training sessions which will be attended. Has the placement of the employee to the training session been done in an accurate and fair manner? Will the individual have sufficient time to examine the objectives and relate them to personal needs?

Along with placement of the employee in the training session we need to consider job involvement of the employee. Is the employee "marking time" until something better comes along or is he/she really excited and enthusiastic about the position? Will the training assist the individual to do the job better? What are the goals of the employee?

We must also recognize the importance of employee expectations in trainee readiness. Does the employee perceive the rewards as being greater than the amount of time and effort expended to acquire and implement the skills taught? Does the individual believe in his/her ability to learn the information?

We not only question the placement, expectancy, and involvement of the individual in training, we acknow-

ledge the importance of a supportive work environment for the employee. Did we notify the supervisor of the proposed attendance of the subordinate at the training session; and did we provide a list of the objectives to determine expectancies of employee behavior upon completion of training? Have we taken into consideration the effect of the individual's training on peer behavior?

Thus, another dimension is added to the trainer's perception of transfer of training, that of readiness. The trainer is now charged with making sure that the employee has been correctly placed and notified of that placement; that the individual is cognizant of the objectives and expects to achieve them (with an amount of effort commensurate with the rewards); considers the training to be beneficial to personal job satisfaction; and believes that implementation of new skills will be welcomed by the majority of peers and management.

RECOMMENDATIONS

The following recommendations are made to trainers:

1. The targeted employees for training should be placed in the session in a fair and accurate manner. The following are some suggestions for insuring that

this will happen:

a)Performance appraisal - The supervisor may indicate that the employee has a need for training during a traditional job evaluation of performance.

b)Diagnostic achievement testing - In an area that can be measured, some testing may be done with results indicating the employee does not reach the standards required by the company.

c)New innovations or technology - The trainee may be assigned to work on new equipment or use a new procedure to accomplish an already existing task. The employee should be apprised of the need for these new procedures or equipment and understand why he/she was chosen to initiate their use.

d)Share the results - Sharing the results with the individual is a crucial part of this step. The employee should be aware there is a need for training and perceive his/her need has been identified accurately.

2. The trainer, if possible, might schedule an informal inquiry interview with potential trainees to examine involvement with the job. The trainer would need to develop a set of questions to focus on attitudes

in correspondence with job performance.

3. The level of expectancy of the individual can be increased by appropriate notification.

a)Advance notice - The employee should be notified enough in advance to adequately prepare for the upcoming training. This preparation might include rescheduling of appointments, the completion of a project, or merely mentally preparing oneself for being away from the job.

b)Objectives of training - Along with notification, the trainer might include a list of objectives for the training session. The individual should have the opportunity to examine the intended on-the-job benefits to make sure they correspond with his/her needs.

c)Assign a task - A task may be assigned to the trainee to emphasize involvement. This example may set the level of participation expected in the training session.

4. The level of support in the environment can be increased. The following may be helpful in allowing the individual to identify ways in which the skills learned in training will be useful on the job.

a)Supervisor involvement - Supervisors and managers should be notified of the subordinate's training and expected outcome. Upon notification, the supervisor

should then discuss with the employee the objectives of the training session and how it might change the performance of the employee.

b)Physical setting - Another way the employee perceives support is the willingness of the company to invest time and money to implement the new techniques to be learned in training. According to Meigs-Burkhard (1986), if the trainee does not see the immediate use (i.e. new equipment) the likelihood of transfer of skills will be minimal.

Insert Figure 1 about here

These are a few of the recommendations made to the trainer to help increase the transfer of skills from training to job performance. There may be others but this will give the trainer a good beginning to "ready" employees for training.

Figure 1: Recommendations to Trainers

Readiness Factors	Recommendations
1.Placement of employees	-Utilization of performance appraisal -Development of diagnostic achievement testing -Appraisal of new technology and innovations
2.Employee involvement	-Schedule informal session to determine involvement
3.Expectancy of individual	-Advance notice -Notification of objectives -Assignment of specific task
4.Supportive environment	-Supervisor expectations -Company's willingness to invest time and money

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THE PROBLEM

I have just been hired as coordinator of training and development for a large organization. My goal is to reassess the training programs offered by doing a careful needs assessment in the entire company. However, after skimming the literature, I'm confused about selecting the best strategy. There are so many different ways to do needs assessment. What are some criteria I should consider before selecting a needs assessment method?

THE LITERATURE

Confused indeed! There's reason to be confused. A partial list of needs assessment methods that could be used includes, advisory committees, plans and forecasts analysis, attitude surveys, climate surveys, group discussions, employee interviews, exit interviews, management requests, needs inventories, nominal group technique, observation of behavior, outside surveys, performance appraisals, product evaluation, questionnaires, and skill tests. With all these choices, how does one match the proper method with the particular organization and the unique situation that it presents?

Isn't there some secret formula that in-the-know trainers use to make sure that the needs assessment method that they have selected is the "RIGHT" one? Isn't this closely guarded secret passed on to new members of ASID upon receipt of their membership dues? Unfortunately, the answer to both of these questions is "no".

Does this mean that trainers are forced to use methods that rely on chance for choosing needs assessment strategies? Does it turn out that coin-flipping, blind dart-tossing, and pulling names from a hat are the commonly used approaches to sifting through the multitude of methods of assessment and coming up with one that fits the occasion? Fortunately, for trainers and their clients, the answer to these two questions is also "no".

At this point, the reader may be saying "Why in the

heck do I want to get involved in the complicated process of needs assessment in the first place? I'm a trainer - not a researcher or statistician! Just let me get in there and do what I do best - train people!" However, there are several valid reasons why a trainer will conduct a thorough needs assessment. Block and Boehm(1986) note that trainers assess needs to:

Determine current performance levels.

Understand the reasons for current performance.

Know the learner population.

Understnad the organizational climate.

Analyze and improve company procedures and systems.

Establish behavioral goals.

Make decisions regarding training content and sequence.

Get management support.

Before embarking on a discussion of criteria to be used when selecting needs assessment mehtods, a close examination of the term "needs" is in order. A trainer must know the nature of that which is being sought before a strategy of seeking can be developed.

A dictionary definition of the term "need" tells us that it is something that is urgently wanted. Yet, training "needs" are quite different than training "wants". Training "wants" are usually hunches or gut-feelings expressed informally by supervisors, managers and employees. According to Duel(1970), these "wants" often result in training programs with "broad-brush cousres which may be fun, but not necessarily functional". Duel goes on to assert that the trainer must channel the informal wants into a sytematic analysis

that will relate general statements of needs to the "where", the "why", the "how", and the "who" of training.

Another approach useful in understanding just what is to be assessed is to examine the types of needs that exist. Tracey(1984) defines four different but complementary types of needs. They are organization needs, group needs, individual employee needs, and job needs.

Organization needs are the-big-picture needs. These macro needs are the results of the goals, objectives, and priorities of the organization. Examples of organization needs include increased productivity, better morale, more efficient organization structure. Because of their broad nature, these needs can be difficult to assess.

Group needs, according to Tracey, are somewhat easier to assess. These needs are more closely related to specific job levels and categories of employees. The groups to be analyzed can be either homogeneous (such as marketing staff, salespersons, or supervisors) or heterogeneous (such as a construction crew consisting of carpenters, bricklayers, electricians, etc.). Examples of group needs would include team building efforts, role-clarification excercises, and leadership training.

Individual employee needs are easier to identify than organization and group needs. These needs are directly related to the physical and mental characteristics, background, education and training, experience, knowledge and skills, motivation, past performance, and career orientation of individual employees. Individual needs can emerge from the employee's current job, an evolving job, possible future

assignments, and/or the employee's career plans. Examples of individual needs include assertiveness training, stress-management, and various technical training needs.

Job needs, according to Tracey, can either be the easiest or the most difficult to define. For those jobs that involve observable motor skills, the assessment process is fairly easy. However, managerial and supervisory jobs are more difficult to analyze because much of what goes on during the job is not easily observed. Two approaches to determining job needs are task analyses and time studies.

Having explored the concept of "needs", let us turn our attention to the needs assessment process. The literature provides several models, or frameworks, for viewing what takes place in the needs analysis effort.

Gunkler(1981) surveyed the various needs analysis procedures and techniques and developed a taxonomy of three distinct types of needs assessment efforts. These types are:

* TYPE O - PSEUDO NEEDS ASSESSMENT PROCEDURES

Efforts that fall in this group would include market research, consumer demand analysis, and educational goal setting.

* TYPE I - PRIMARY DATA SOURCE PROCEDURES

This type of needs analysis includes two subtypes: those procedures that collect data about and from the target population, and those procedures that collect data about the target population from another population. Behavioral observations of and interviews with members of the target population would fall into the first subtype. Surveys of and interviews with supervisors and managers of the target population

would fall into the second subtype.

*** TYPE II - SECONDARY DATA SOURCE PROCEDURES**

These procedures involve analysis and interpretation of data "about" the population, and analysis and interpretation of data about previous "treatments". An example of the first situation, provided by Gunkler, would be a Yankelovich-type public opinion study of today's worker. An example of the second situation would be an analysis of the courses and grades of people like those for which we are going to be designing training programs.

Smith, Delahaye, and Gates(1986) approach the needs analysis process somewhat differently than Gunkler. Instead of saying that there are three different types of needs assessment procedures, they developed a three-stage model of needs analysis that they feel should be applicable to all situations. The three stages of this model are surveillance, investigation, and analysis. These stages are summarized as follows;

*** SURVEILLANCE.** This is a continuous activity that involves on-going review of "state-of-the-organization" information. Surveillance enables the trainer to maintain an up-to-date picture of what is happening in the organization and allows for the identification of trends that may indicate problems or opportunities.

*** INVESTIGATION.** This stage involves the collection of "detailed and specific information relevant to a carefully defined and limited area of operations". Effective investigation is dependent on a successful surveillance. Areas of investigation are defined in the surveillance stage.

*** ANALYSIS.** This activity involves "examining incoming data

to eliminate information that is demonstrably invalid, grouping the remaining data, drawing appropriate conclusions from the summaries, and communicating the outcomes to others". This activity requires skills that include an understanding of the limitations of various types of data and data collection methods, as well as a knowledge of the uses and limitations of statistical procedures. Smith, Delahaye, and Gates suggest that since most organizations employ at least one person with these skills, the trainer doesn't necessarily have to be an expert in these areas.

Regardless of the perspective one takes toward the process of needs assessment, the fact remains that there are many methods of data collection available to the trainer. What are the deciding factors in determining the methods that will be used in the organization you are working in/for?

Steadham(1980) says that there are no particular "laws" or rules to follow in selecting a needs assessment strategy. He states that criteria will vary for different organizations in different situations. Though the criteria will vary, it must be stated explicitly. According to Steadham, if the criteria are not clearly spelled out, there is a risk of skipping over one or more important considerations. He goes on to suggest starting out by making a list of at least three criteria that were used the last time a particular needs assessment method was selected. Having colleagues make a similar list and sharing it with you will quickly broaden the scope of your criteria.

Steadham also provides a checklist for selection criteria that uses key questions to be asked during the methods

selection process. A sample of these questions include;
What resources are required and available for the needs
assessment?

Who is to be involved in the data collection?

To what extent does the client system already KNOW the needs?

What type of needs are to be uncovered?

How confidential or anonymous are the data to be?

How comfortable is the trainer with a particular method?

Steadham also suggests listing possible assessment methods and noting the advantages and disadvantages of each. Comparing this list with the list of individually generated criteria will enable the trainer to eliminate those methods that clearly are not applicable to the situation.

Though Steadham is careful about supplying any hard and fast rules concerning selection of needs assessment methods, he does provide four "thumbnail postulates". They are:

- * ENERGY CONSERVATION: Do not spend so much time and effort in the needs assessment process that there is no energy left for the actual educational activities.

- * METHODS POTPOURRI, or NEVER USE ONE WHEN TWO WILL DO: Select two or more methods in such a way that the advantages of one will offset the disadvantages of another.

- * FREEDOM TO RESPOND: Keep the methods flexible enough to allow the clients/subjects to respond in the way that they consider important.

- * HAVING SOMETHING HAPPEN: Reach an understanding with the client, BEFORE you begin data collection, that there will be an appropriate response to the assessment data.

Tracey takes a somewhat more concrete approach to the

selection of needs assessment methods. Tracey feels that before selection criteria can be established, several preliminary considerations must be taken into account. These include the nature of the organization, the composition of the workforce, the facilities available for training, and the training and development staff.

Gepson, Martinko, and Belina(1981) provide a list of seven criteria to be used in the selection of a needs assessment strategy. They are:

- * PARTICIPATION. To what extent will members and levels of the organization be involved?
- * EXPENSE. Will the needs assessment procedure selected provide a cost-efficient method of securing relevant data?
- * OWNERSHIP. Is the procedure designed so that each employee feels that problems identified represent their input and key concerns?
- * CONCEPTUAL CLARITY. Is the procedure easily understood by all employees and managers involved?
- * PROBLEM DIFFERENTIATION. Does the procedure differentiate among problems and place them in classifications indicative of their origins and possible solutions?
- * AFFECTIVE STATES. Does the procedure result in a "reading" on how the employees feel about the organization and its problems?

Newstrom and Lilyquist(1979) developed a similar list of five criteria to be considered when choosing a needs analysis method. Their criteria are:

- * EMPLOYEE INVOLVEMENT. Employees have both a legitimate "need" to know And a "desire" to know why they have been

selected for training.

- * MANAGEMENT INVOLVEMENT. Managers need to be involved in the needs assessment effort so that they will support the training program by encouraging attendance and providing an opportunity for the trainees to apply their new knowledge.
- * TIME REQUIRED. The amount of time that a trainer can devote to the needs assessment process as well as how much time workers can be away from their jobs are two major factors to be considered.
- * COST. Will the benefits of the method justify the cost?
- * RELEVANCE AND QUANTIFIABILITY. Corporate executive are understandably concerned about the rationality of training expenditures. Therefore, the needs assessment method must produce measurable data that is relevant to the organization's training needs.

Newstrom and Lilyquist have taken this criteria and developed a contingency model of needs assessment methods. The model rates twelve commonly used assessment methods according to their criteria on a low, moderate, and high scale. This model is useful in that it provides an easy method of weighing the advantages and disadvantages of a given method for a given situation.

Smith, Delahaye, and Gates have taken this contingency model a step further by developing an Evaluation Criteria Matrix. By assigning numerical values to the priority of the criteria and the organizational utilitarian value of each method, the trainer can develop quantifiable data about what method might be the best to use in a given situation. Though the approach seems a bit complex, it would satisfy those

individuals that want to use hard data to select the right needs assessment method.

RECOMMENDATIONS

Despite the differences in perspectives and approaches, it seems that the major questions to be considered when selecting a needs assessment method are:

1. What kind of data will be most useful in determining the training needs of the organization?
2. Who are the people that can best provide the necessary data?
3. How much time is there to conduct the needs assessment process?
4. Are the benefits of the method selected enough to justify the cost?

Given these four basic questions, I would provide the following recommendations.

1. Select a needs assessment method that results in the involvement of as many employees and levels as is possible, given the time and cost limitations that are specified.
2. Make sure that the people that are providing the data know about the assessment process as it relates to their job and how the data will be used to fill in the "big picture".
3. Acknowledge and accept your talent and skills in reading between the lines. Understand that your hunches and gut feelings may be on target.
4. Use hunches and gut feelings to generate more data, not in place of it. If something "inside" you tells you that

- a problem exists somewhere, get data to support your hunch.
5. Keep thinking in terms of the results of the needs assessment process and the actions that will be taken because of it.
 6. Respect people's need for confidentiality. If you give your word that something will be kept confidential, stick to your word!
 7. Look for sources of data that already exist. There is no reason to re-invent the wheel when organizational records might provide valuable data. Examples of this could include absentee records, performance appraisals, safety records.
 8. Don't forget that the needs assessment process is just the beginning of the training effort. Don't spend an undue amount of time, money, or energy on it, there's a lot of work to be done after it.

CONCLUDING REMARKS

Yes, there are a variety of needs assessment methods that can be used by trainers. Without careful planning, the trainer runs the risk of selecting a method that will not only provide useless data but waste valuable time and resources as well. Communication is the key to avoiding this possibility. Know your, and the client organization's, limitations before committing yourself to a method or technique. If you have questions about the limitations, policies, and/or procedures of the organization, ask the person that can answer the question best. If you have questions about your own limitations, skills, and/or abilities, contact a colleague and share these thoughts with

them. If you don't know someone that you feel comfortable sharing these thoughts with, contact your local chapter of ASID and find out when their meetings are and attend them. The members are there to network with. Every one of these people were new to the field at one time and have probably had the same feelings, or confusion, as you. They have been through it and they can help you get through it!

NOW, GO GET 'EM!!!

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MANAGEMENT DEVELOPMENT PROGRAMS

**Jim Hayward
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**I WANT OUR ORGANIZATION TO BE
COMPETITIVE AND I KNOW THIS MEANS DEVELOPING OUR
MANAGERS AND TOP EXECUTIVES. THERE ARE SO MANY
POPULAR BOOKS OUT ON ACHIEVING MANAGERIAL
EXCELLENCE, I 'M NOT SURE WHAT DIRECTION TO TAKE
IN SETTING UP A MANAGEMENT DEVELOPMENT PROGRAM.
WHAT ARE THE MOST CRITICAL ISSUES AND SKILLS TO
ADDRESS IN A MANAGEMENT DEVELOPMENT PROGRAM?**

As stated in the premise, the quality of management is a critical factor in determining the success of an organization. Realizing this, many organizations have turned to management development programs. One question each program must face is, "What skills should be taught?" If there were one answer to this question we would probably know it by now. The fact is, there is a wide range of approaches of possible solutions. The selection of an appropriate solution is just of factor in determining the success or failure of a program. The difficulty is that each managerial situation is potentially unique and in order for a management development program to be effective it should be modified for each context.

Burr (1967) defines management development as "the planned experience, guided growth and training opportunities provided for those who perform management functions". While broad, this definition does serve as a point of reference.

Burr (1967) sees the purpose of a management program as twofold. The first objective is improvement of immediate performance. The second objective is to identify those with potential for future advancement. Neither Burr's definition or purpose are rejected by subsequent authors but the emphasis is changed by individual programs.

Burr (1967) suggests program content should be determined by individual needs and increase in breadth as the complexity of the job increases. Burr distinguishes between development and training. Training implies routine tasks or acts whereas development takes the whole person into account. The only suggestions of course content made by Burr is that a program may range from high school level courses upward and technical or semi-technical refresher courses.

Burr provides a starting point for this writing despite the fact that his article does

seem limited by the time at which it was written. Management development programs that were appropriate for 1967 would probably need to be modified for today.

Summers (1985) identifies at least five factors that influence management development programs:

- 1) the economy
- 2) international competition
- 3) national demographics
- 4) lower tolerance of gimmicks
- 5) technological advances

Summers (1985) does not deny the possibility of other factors, rather these five are currently important and identifiable. The point is made that these factors and others influence management development programs and as these factors change so too should management

development programs.

Summers (1985) also identifies eight trends that further demonstrate how a program is influenced by external factors:

- 1) back to basics
- 2) concern for validity
- 3) demand for instructional technology
- 4) making managers into trainers
- 5) acceptance of holistic health model
- 6) search for motivators
- 7) use of feedback technology in human system
- 8) increased attention to developing administrative skills

These trends identified by Summers are far removed from Burr's notion of what management development should be.

This serves to reinforce the idea that programs must continuously evolve in order to remain current. The underlying goals of improving performance and identifying potential are present but the overall program being implied is of a much different character.

Other readings substantiate the trends cited by Summers. Bolt (1985) surveyed twenty Fortune 100 companies and reached conclusions that seem to support Summers. They survey asked executives what they perceived as the future direction of their training programs. Bolt (1985) concluded that management and executive training was experiencing a "back to basics" movement with training becoming more results oriented and tied to corporate objective. This survey recorded factors which executives felt influenced their training needs. The factors were similar to those identified by Summers. According to Bolt (1985) there was unanimous agreement on a trend

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within management development programs towards the inclusion of teaching methods and skills to improve productivity. The second most anticipated need was in relation to new information technology; computers, data networks, and telecommunications. Additional subjects identified as future needs were management skill, interpersonal skills and managing human performance. Other content areas expected to become important dealt with situations peculiar to particular businesses; strategies, implementation of strategies, worldwide business issues and industry specific trends.

Bolt's findings agree with Summers' in several areas. Bolt (1985), like Summers (1984) foresees a closer look at the benefits of training and thus a closer link with corporate strategies. Bolt also sees a move towards more management involvement in the development and delivery of training.

The role of managers as trainers also is

advocated by Christensen and Kinlaw. Christensen and Kinlaw (1984) believe managers are an underused resource and can benefit every phase of management training. Christensen and Kinlaw (1984) state that involving managers in training encourages interaction among all levels of management.

The need for a more accountable management development program is echoed by Macher. Macher (1984) advocates a development program that is oriented towards providing solutions not just programs. Macher does not object to the content of present day development programs. Macher simply wants programs to be used appropriately with a specific result in mind. The emphasis leads Macher to stress the importance of needs assessment. Without sound needs assessment it is difficult to demonstrate the benefit of any training. In Macher as in Bolt and Summers we see the trend towards programs that serve specific purposes and produce specific desired

results. The emphasis being accurate analyzation of a situation and accurate selection of skills to be taught.

The notion of linking management development to corporate goals is taken a step further by Hornstein and Mackenzie. Hornstein and Mackenzie take the view that management development is a part of organizational development Hornstein and Mackenzie (1984) state that organizational development and management development should be combined in order to be truly effective.

Hornstein and Mackenzie coin the term "consultraining"; a process in which managers discuss and try to solve work related problems. The managers simultaneously receive consultation and training. Hornstein and Mackenzie see management development and organizational development as two activities that

have historically been kept separate when they are in fact complimentary. Consultraining allows managers to solve organizational problems and develop individual skills at the same time. If treated separately the effort is disjointed but if kept together the two activities are mutually supportive and provide a much greater opportunity for both to succeed.

Conventional management development programs have consisted of management skills, communication skills, interpersonal skills and related topics. This traditional subject matter has been thought to provide managers with the tools necessary to productively run their area. One source, William S. Mitchell (1984) of Metropolitan Life, believes what has been overlooked is training aimed directly at productivity. Mitchell believes an emphasis should be placed on work-level forecasting, work scheduling, resource scheduling, organization structuring, output monitoring and other more

technical skills. Within the same discussion another source, David Groff the manager of management education for Corning Glass Works, advocated the role management development in perpetuating the corporate culture. Groff's (1984) view of a program closely linked to corporate objectives places a high priority of the values of the organization.

DISCUSSION

The premise asked, "what are the most critical issues and skills to address in a management development program"? By itself this question has no specific answer. The only way this question can be answered appropriately is when it is preceded by some form of needs assessment. That needs assessment must consider several different factors. These factors are:

- 1) what are the requirements of the job
- 2) what skills are necessary to perform the job

3) what skills does the individual presently possess or lack

If these questions are not answered a development program is more likely to provide inappropriate training. There is no template or outline that can be followed. Each managerial position is potentially unique as is each learner and the only means of insuring that a proper program is being implemented is needs assessment.

The role of the manager has changed or should change in relation to the times. It is perhaps ironic that in the face of the expanding technology and fluctuating economic trends the

most consistent element of a manager's role may be his/her interaction with people. Realizing this many management development programs have been created that attempt to teach managers how to motivate, evaluate, communicate and develop

their employees. These programs have occasionally been criticized as not being skill oriented or having immeasurable objectives. Other programs may focus on the business aspects of the job and they in turn miss the human factor of a manager's job. In order to avoid these criticisms a management development should:

- 1) Identify demands of each managerial role
- 2) Identify needs of learners
- 3) Establish clear and legitimate learning objectives
- 4) Align those objective with organizational goals, physiology and objectives
- 5) Establish a means for evaluation of the learner
- 6) Establish a means for evaluation of the program
- 7) Adjust itself as indicated by evaluation and changing external factors

It is difficult to offer suggestions regarding the content of a managerial development program. Without a frame of reference it is easy to become both too broad and too specific at the same time. The following suggestions are offered cautiously.

A management development should address:

A manager's ability to interact productively with employees; to train, to motivate, to discipline, to direct etc.

A manager's knowledge of company practices and procedures

A manager's knowledge of the organization's business and individual area's function

These three areas are admittedly broad but they do divide the manager's responsibility into

sections that can then be analyzed through job description or analysis and subsequently be used to derive requisite skills for a given managerial position.

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Career Development Within the Workplace

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Simpson College

Recently I have been noticing numerous articles on career development in organizations. I think there would be support for this type of program in our company, but have no idea how a career development program should be designed or implemented. What factors should I consider in designing a career development program and ensuring its success and acceptance?

Discussion

Definition of Career Development

The concept of career development within the workplace has received widespread attention within recent years. As people are changing careers more frequently, the setting for career guidance has expanded beyond high school and college campuses into the workplace (Gysbers, 1984; Hanson, 1984; Minter, 1980). This phenomenon has prompted employers to consider exactly what career development is and what role it will have within their organizations.

The roots of the concept of organized career development trace back to the early 1900's. In 1908 Frank Parsons, founder of the Vocational Bureau in Boston, defined career development as a process which must encompass an understanding of oneself, the world of work, and a true reasoning of the relations of these two areas of concerns (Brown, Brooks and Associates, 1984).

More recent definitions of career development focus on the relationship between the individual or employee and employer. Gutteridge & Otte (1983) suggest that career development represents the outcomes which occur as a result of a combination of an individual's career planning actions and organizational

objectives. The general expectation is that the outcome matches individual needs and interests to organizational opportunities and requirements, so that both the employee and employer benefit (Gutteridge & Otte, 1983; Kaye, 1981; Otte, 1982).

History of Career Development in the Workplace

Significant growth in career development did not occur within most organizations until the 1960's. Prior to that time efforts in human relations focussed on survival issues ranging from manpower planning for war efforts to demands which eventually shifted to accommodate the space age.

Fortunately by the 1970's, human resources legislation gained popularity. The concepts changed in focus and employees were viewed as resources, not simply individuals who were demanded to meet performance standards (Minter, 1980). The changing nature of the workforce was recognized and an increase in career development programs occurred. Between 1960 and 1970 the number of operational career development programs increased from 100 to 1000; by 1980 almost 5,000 programs were in operation (Otte, 1982).

Managers interest in career development programs have extended beyond that of conforming to Equal Employment Opportunity and Affirmative Action legislations. Issues such as employee

turnover; productivity and creativity; succession planning; mismatched employee and employer goals; and the quality of work life have become significant. Managers have recognized that career development programs may prepare employees for challenging and rewarding positions within the same organization, alleviating the cost of hiring new employees (ASTD, 1981; Gutteridge & Otte, 1984; Rothenbach, 1984).

Employees of all sorts, including potential managers, stagnated professionals, frustrated secretaries, entry-level people, high tech specialists, near retirees, surplus workers, and industrially injured victims have begun to benefit from career development programs (Gysbers & Associates, 1984). Evaluation of a career development program at Lawrence Livermore National Laboratory indicated employees showed greater feelings of self-control with respect to career development, increased their work activity, and felt greater work satisfaction following participation in the career development program (Hanson, 1981).

Thus, it becomes evident that career development programs are being developed in the work place more frequently, benefiting both the employee and employer. Brown and Brooks (1984) predict that future trends will continue in this direction, increasing the availability of programs, in a greater variety of settings, and

for a wider variety of personnel.

Program Design and Implementation

Career development programs may be developed in various fashions. Seminars or workshops are common, with sessions ranging in length from a few hours to a given number of hours per week over an extended period of time. A recent study of 40 U.S. organizations revealed that 31 out of the 40 organizations utilized workshops or seminars and evaluated their effectiveness with an average score of 4.25 on a 5.0 scale (Guttridge and Otte, 1983).

Career counseling sessions are another means of programing. Some organizations hire professionally trained career counselors and other depend upon in-house personnel. Sessions may be arranged on an individual or group basis and commonly continue over a period of time (ASTD, 1981; Gysbers, 1984; Minter, 1980). According to Gutteridge & Otte (1983), this mode of program occurred in 32 out of the 40 companies surveyed, and received an average rating of 3.71 for effectiveness.

Workbooks ranked third for effectiveness in this study, with an average rating of 3.5 (Gutteridge and Otte, 1983). This strategy provides self-directed study and may be developed in-house or purchased from professionals outside the organization.

Additional means of career development programs may be effective as well. Internal job posting can be done easily and inexpensively to inform employees of career opportunities within

including skills, values, interests, and preferences. This phase may be referred to as analyzing needs (Leibowitz et.al., 1985), self-assessment (Leibowitz and Schlossberg, 1982), or profiling (Kaye, 1981). Confronting such issues helps strengthen participants' perceptions as they relate to careers.

Once the assessment is completed the individual needs to narrow down her/his career goals. Leibowitz and Schlossberg (1985) term this environmental appraisal and Kaye (1981) refers to it as targeting. During initial goal setting it is essential for the facilitator to be prepared to relay information to the employees concerning corporate objectives, trends, anticipated changes, and human resource needs (ASTD, 1981; Minter, 1980).

Developing methods to meet desired goals follows the targeting phase quite naturally. Strategizing (Kaye, 1981) or career pathing (Minter, 1980) describe the individual's desire to determine a specific plan of action which will enable him/her to obtain their career goals.

Finally the employee has an opportunity to execute the intended plan of action. Career action planning ultimately provides the individual with the sought out challenges and experiences (Leibowitz and Schlossberg, 1982).

Unfortunately it is too easy to end the process with

implementation, when in fact, this is the prime opportunity for the trainer to learn how to improve or revise the program for future participants. It is also an excellent time to share the enthusiasm of participants throughout the organization in order to put momentum behind the program. The end may be just the beginning.

Summary

The concept of career development was expressed as early as 1908, but only within more recent years has it evolved in the workplace. Career development is a lifelong process which incorporates an individual's and organization's goals, to produce an outcome which meets the needs of both parties. As individuals continue to change careers several times within their working lives, organizations will continue to sponsor in-house career development programs.

Career development programs in the workplace provide the employee with intrinsic rewards such as challenges, growth and development; these issues must be addressed to motivate and satisfy professionals. In turn, such programs provide the employer with improved employee morale, less frequent mismatches in jobs, opportunity to identify talent for future use, better use of personnel systems, and the chance to maintain motivation of employees.

Seminars, workshops, career counseling sessions, workbooks, internal job posting, support systems, and career resource centers are all effective vehicles for career development programming. Each program should be individualized for a targeted population and provide opportunity for participants to explore, consider

alternatives, select and implement goals. The program should not come to rest without formal evaluation.

Recommendations

Based upon the information in the discussion and summary sections, the following are recommendations to consider when planning and implementing a career development program:

- Perform needs assessments. Attempt to target a small homogeneous group and design a program in response to particular needs.
- Design the program to interact with other ongoing personnel practices (such as performance appraisals) in order to tie into existing structures and gain support of front-line supervisors.
- Obtain support from top management using a planned change approach as opposed to a hard sell tactic. Pilot programs may be good icebreakers, as well as cost effective.
- Establish indicators of program effectiveness and utilize in the evaluation process.
- Avoid programs which do not allow employees to implement career goals such as vertical or lateral career moves within the organization.
- Design multiple approaches such as workshops, counseling sessions, job positions, etc...
- Develop effective communication about the program. Make known the rewards the participants have received.

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